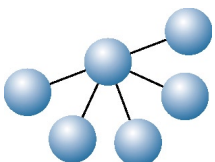


**Evaluation of
Learning Challenge Fund
Final Mini Evaluation Report**

Training for the Social Economy Wales Co-operative Centre



Llywodraeth Cynulliad Cymru
Welsh Assembly Government



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1. INTRODUCTION

1.1. Training for the Social Economy

Background and aims

- 1.1.1. Wales Co-operative Centre (WCC) is a leading development agency for co-operative businesses in Wales. The centre provides business advice and training to enterprises across the spectrum of the social economy.
- 1.1.2. In 2003, Wales Co-operative Centre received £464,252 of Learning Challenge Fund (LCF) funding to run the Training for the Social Economy project. The Centre also received ESF Objective 1 and 3 funding of £425,584, bringing the total value of the project to £889,836. The Training for the Social Economy project aimed to strengthen WCC's previous training offer, creating a more integrated programme with an updated curriculum, and piloting new forms of learning. The project also aimed to create a learning community within the co-operative sector in Wales and develop opportunities for good practice sharing.
- 1.1.3. The Training for the Social Economy project was initially funded for 3 years. The project has since received an extension to continue its activities until the end of December 2006 and a further project extension to end February 2007 is being considered by DELLS. At the time of writing, therefore, the project was not yet complete.

Project objectives

- 1.1.4. The project's main objectives, as set out in the original bid for funding were as follows:
 - to identify and target those organisations within the social economy who would benefit from training and development to promote lifelong learning;
 - to develop and pilot a structure of flexible training approaches in order to improve access to learning and meet training needs of co-operative sector organisations within the social economy;
 - to provide individual beneficiaries with the learning opportunities to enable them to develop new skills, move onto further learning opportunities or employment or develop their businesses;
 - to develop and pilot opportunities for e-learning;
 - to establish and develop an evaluation system to monitor delivery against need and guide the development of future training initiatives;
 - to develop a system of implementing and evaluating workplace learning; and
 - to strengthen co-operative sector organisations within the social economy to ensure they achieve long-term sustainability.
- 1.1.5. These objectives set out in a more quantifiable and detailed form in the contract agreed between WCC and ELWa at the start of the project.

1.1.6. To achieve these objectives, the project included the following strands of work:

- delivery of a wide range of training courses, through WCC's own tutors and through the Workers' Educational Association (WEA), to groups of learners within the social economy or those interested in getting into or starting a social enterprise;
- development of new bespoke course materials and delivery of these courses to individual social enterprises, following training needs analyses carried out with these organisations;
- development and piloting of e-learning provision; and
- creation of learning networks for groups within the social economy.

1.2. Evaluation activities

1.2.1. In 2003, Shared Intelligence was commissioned by ELWa – now the Department for Education, Lifelong Learning and Skills (DELLS) - to evaluate the Learning Challenge Fund on an ongoing basis. The evaluation programme included a mini evaluation of each of the LCF projects, as well as an assessment of the LCF's progress as a scheme.

1.2.2. The first stage of the LCF evaluation reviewed the development and process of setting up and administering the Learning Challenge Fund. Project mini evaluations, including the mini evaluation of the Training for the Social Economy project, began in 2004.

1.2.3. Wales Co-operative Centre has carried out its own evaluation research throughout the project - developing robust evaluation systems was one of its key objectives. This has included gathering course evaluation forms from all learners, collecting feedback on conferences and one-off events, and carrying out a longitudinal survey of learners. Si's evaluation tasks aimed to complement these activities by carrying out qualitative research with network members and working with the DELLS Contract Manager to devise a common format for monitoring course provision and gathering verbal feedback from learners.

1.2.4. This mini-evaluation is based on:

- an initial project visit in August 2004, with Centre Director and Project Manager;
- attendance at 'Putting the Pieces Together with Training' conference in March 2005;
- face to face meeting with ELWa Contract Manager in June 2005;
- attendance at Regional Learning Network meeting in October 2005, including informal interviews with participants;
- interim telephone conversations with the Project Manager and ELWa Contract Manager during lifetime of the project;
- semi-structured telephone interviews with Learning Network members; and
- regular review of project reports and data, including monitoring reports and

2. PROJECT PROGRESS AND EFFECTIVENESS

2.1. Progress in delivering project activities

- 2.1.1. As mentioned above, key project activities included delivery of training (general and bespoke); development and piloting of e-learning provision; and promotion and facilitation of learning networks among those working within the social economy.

Training

- 2.1.2. Training delivered through the project can be described broadly as falling into one of 3 categories: general training, foundation courses and bespoke training. By the end of June 2006, 467 general and foundation courses had been delivered, and 131 bespoke courses. More information on each of these types of provision is given below.
- 2.1.3. *General training courses* – training for co-operatives, credit unions or other members of the social economy on subject areas of common need - have formed the majority of provision. These courses, lasting a day or two days, are run by WCC in locations across Wales on a fixed schedule. Courses centre around skills needed to run social enterprises and span basic introductory levels right through to business planning and strategy.
- 2.1.4. Most are open to all organisations within the social economy, although a few are aimed specifically at credit unions. This is a significant shift from provision prior to the LCF project, which was generally delivered within individual organisations rather than to mixed groups of participants from different organisations. Through joining up training into an integrated programme, WCC has aimed to establish links between the different types of organisation within the social economy – which perhaps had not realised before that they had things in common, or indeed even recognised that they were part of the social economy.
- 2.1.5. *Foundation courses* are broader in their subject matter than the general WCC training as they are aimed at community members who are either members of a co-operative or individuals taking part in the social economy. These courses are generally centred around personal development, meeting basic skills needs, and 'hooking' people back into learning, and to date have included leisure courses as well as those oriented towards skills needed within the social economy. This provision has been delivered by South Wales Workers Educational Association (WEA), Coleg Harlech WEA and external tutors on behalf of WCC.
- 2.1.6. *Bespoke courses* are aimed at co-operative businesses and credit unions and are designed to meet needs of particular social enterprises. They are generally delivered to individual organisations rather than as open courses. Subject matter of courses to date has been similar to the general training provision, but tailored to organisations' needs.
- 2.1.7. As well as delivering training, WCC has proactively encouraged social enterprises to take up the offer of **training needs analyses** (TNAs). These are offered at two levels: full day-long TNAs involving all senior staff/board members; and a more informal TNA where organisations are visited by a training officer who

speaks to selected key staff rather than going through the whole day process. The latter option has proved more attractive to organisations as it is less resource intensive.

- 2.1.8. WCC reports **no major barriers to delivery of training so far**. Minor setbacks include the fact that some courses have had to be cancelled owing to low attendance – courses must have at least 8 learners signed up in order to go ahead. In response to this, WCC introduced a cancellation fee for learners, although the courses themselves are free. This proved effective in encouraging people to attend. One other issue was raised around the foundation courses delivered by WEA. These are not directly linked to the social economy in the same way that WCC's training is, but are centred around personal development and can therefore cover a range of topics. However, when reviewed by ELWa, it was found that WEA were delivering courses including 'Healing through Colour' and 'Introduction to Reiki' that were not considered appropriate for the contract. These were later stopped by ELWa although it has since been noted that WEA has delivered 10 courses in 'World Singing', which the DELLS Contract Manager has asked WCC to investigate.

Learning Networks

- 2.1.9. Through the course of the project to date, WCC has set up **three Learning Networks**, including regional North and South Wales employees' networks for Credit Unions, and a business succession network that covers the whole of Wales (there are about 20 businesses nationally going through transfer to social enterprises that are taking part). Networks meet regularly, for example every six months, with meetings facilitated and supported by WCC, although members themselves set the agendas and terms of reference.
- 2.1.10. Within the last year, WCC has started to promote mentoring and skills sharing within the networks. Members have been asked to provide information about their areas of expertise and particular skills and experience they have and would like to share, so that WCC can help put members in touch with each other to provide support on particular issues. For example, one network member has a good knowledge of the software used by credit unions and has offered to provide training on this to other members. WCC is also working towards setting up a formal mentoring system between network members.
- 2.1.11. The North Wales Credit Unions network has now become self-sustaining. Members decided to integrate the networking concept into an existing standing meeting. WCC is still facilitating meetings of the South Wales Credit Unions network and the Business Succession network. It is hoped that both of these will also become self-sustaining in due course.

E-learning

- 2.1.12. The e-learning project aims to make three of WCC's core units available to study online, with tutor support and interactivity with other learners. WCC has been developing course materials and has contracted with Llanelli College to develop the material for online learning and run the pilot.
- 2.1.13. Course material is being adapted from current modules, with one unit aimed at credit unions, one at co-operative businesses and one generic one on customer care, which all social enterprises can make use of.

2.1.14. It was initially intended that the pilot would go live in January 2006. However, developing the course materials has taken longer than planned because both the level of time and experience needed to produce the materials was originally under-estimated. It is now intended that the first module will go live in September 2006, to be followed by the unit for co-operative businesses.

Other activities

2.1.15. Additional activities funded through LCF have included running a day-long conference, 'Fitting the Pieces Together with Training'. The conference was aimed at all organisations within, or interested in, the social economy. It was interactive and aimed to create a greater understanding of the diversity of the social economy, identify training needs and help participants learn from, and network with, one another.

2.1.16. Learning Challenge Fund monies have also funded evaluation and, latterly, marketing of the courses, although this was agreed through a contract variation rather than in the original bid for funding as WCC had omitted to include marketing costs in their proposal.

Progress in meeting contractual targets

2.1.17. WCC's core quantitative targets for the project were for engagement of new beneficiaries; beneficiary days; and beneficiary hours. The table below shows the extent to which these targets had been achieved as at the end of June 2006.

Training for the Social Economy – Core outputs to end June 2006			
	Target to date	Actual	Variance
New beneficiaries	2,092	2,494	+19%
Beneficiary days	4,937	4,899	-1%
Beneficiary hours	30,166	29,392	-3%

2.1.18. As the table shows, the project has been very successful in engaging new beneficiaries. Analysis of beneficiary data over the duration of the project shows that, as the project progressed, greater numbers of new learners took up provision – reflecting the way the project has gained momentum since it started. In fact, the month of July 2006 saw the greatest number of new beneficiaries since the project began and **598 general and bespoke courses** had been delivered by the end of that month, against a target of 630 for the whole project.

2.1.19. Nevertheless, the project has encountered some difficulties in meeting targets for beneficiary hours and days, owing to the way in which targets had been profiled. The original profile assumed that each new beneficiary would undertake three days' worth of training in the quarter that they joined up. Most of WCC's training lasts only one or two days, so this would mean that beneficiaries would need to take more than one course within a quarter if the target was to be met. In fact, while learners are often 'repeat customers' of WCC, they are likely to take a longer time period than this to complete 3 days' worth of training. Over the lifetime of the project, the Centre has also faced some difficulties in monitoring its targets, particularly during 2005 when the project team lacked an administrative

officer and consequently there was a backlog of beneficiary data to be collated.

- 2.1.20. The shortfall in beneficiary hours was one of the key reasons that the project was able to agree an extension to its original contract with ELWa, to run until the end of December 2006. This also allows the project to maintain the momentum it has built up, which, as the project manager notes, is very important to the Centre.
- 2.1.21. To date, the project has underspent by some 10%, with a 30% underspend against the profiled amount to claim from DELLS during the quarter April – June 2006. A contract extension to the end of December 2006 has already been granted, and DELLS is considering an application by WCC for a further extension, which would keep the project running until the end of February 2007.
- 2.1.22. WCC has, therefore, been successful in delivering most of its targets, but with a longer timescale required to meet some of its goals.

Effectiveness of project delivery

- 2.1.23. Looking at effectiveness of project delivery from a client's point of view - for example, considering how well training is organised and delivered - gives a very positive picture. Feedback from beneficiaries suggests that WCC has delivered high-quality training and networking opportunities through the LCF project.
- 2.1.24. With regards to delivery of training, learners themselves have contributed feedback via questionnaires distributed at the end of courses, and through the longitudinal survey commissioned by WCC. WCC's analysis of learners' immediate feedback (from forms distributed at the end of courses) shows that almost all thought the course they attended was good or excellent. WCC analysed over 1,100 course evaluation forms, including from new beneficiaries and those who had previously used WCC training.
- 2.1.25. Meanwhile, the survey of learners, carried out several months after courses were completed, found that learners' positive perceptions of the quality of courses were maintained over time. For example, 98% of the 150 respondents agreed with the statements 'the instructor had a good rapport with the group' and 'the instructor explained the course material clearly'. Learners' comments, as recorded by the telephone interviewers, included:

"I was delighted by the high standard of training offered by WCC - very high quality."

- 2.1.26. Meanwhile, Learning Networks member whose organisation had regularly accessed WCC training echoed this response in an interview with Shared Intelligence:

"[Wales Co-operative Centre's training is] flexible, friendly, well-organised, learning materials are very well put together. Trainers are very approachable and well trained with good classroom management skills...it couldn't be improved."

"They're very flexible, they'll do in-house training specifically for your organisation, and they'll tailor it, and they do go out of their way to learn about your organisation and the people in it."

2.1.27. The DELLS contract manager also carried out monitoring visits to training courses, making notes on quality of venue and trainer, as well as speaking to learners and gathering ad-hoc feedback. The monitoring visits showed that venues were generally well-chosen, although accessibility (location) was a problem in some cases. Nevertheless, the trainers were noted to be of high quality, as the following, taken from one of the monitoring reports, demonstrates:

"The tutor had a relaxed flexible approach to delivery. She engaged learners through group work, feedback and in discussion about their own organisation and their experiences. The course was pitched at exactly the right level with appropriate examples handouts used to emphasis important points."

2.1.28. Positive feedback on delivery of training was reflected in the feedback on delivery of the Learning Networks. An evaluation visit to a meeting of the South Wales Credit Unions network, carried out by Shared Intelligence, also found that the group was well organised and facilitated, and that participants felt that the agenda was well constructed, with appropriate guest speakers invited. One network member who was interviewed commented on how it was a good forum for meeting people from other credit unions, and that the policy updates were particularly useful.

3. PROJECT OUTCOMES AND IMPACT

The various evaluation activities carried out by Shared Intelligence, WCC and the DELLS contract manager have highlighted outcomes from the LCF project, both for learners and for the Wales Co-operative Centre itself

3.1. Outcomes and benefits

Training course participants

- 3.1.1. Wales Co-operative Centre has carried out evaluation work with learners throughout the course of the Training for the Social Economy project, including gathering immediate feedback from learners after training courses, and commissioning a telephone survey of learners conducted after courses were completed. Meanwhile, the DELLS contract manager carried out monitoring visits to training courses and gathered qualitative feedback from learners, face-to-face.
- 3.1.2. WCC's analysis of over 1100 feedback forms, distributed by tutors and completed by learners immediately after their course, showed that **learners felt that their level of knowledge on the subject studied had improved**. Individuals were asked to assess their knowledge, categorising it into low, medium or high, before and after the training session. 98% of those with 'low' knowledge moved to 'medium' and the number of participants with a self-assessment of high knowledge increased 8 fold. Further, 88% of respondents felt their learning objectives had been met.
- 3.1.3. A report completed by WCC in March 2006 gave detailed results of the telephone survey, which was undertaken with a random sample of 150 participants who had benefited from the project between October 2003 and January 2006. The survey included samples of learners undertaking general, foundation and bespoke training in proportion with the overall numbers engaged in these forms of training.
- 3.1.4. The survey found that **participants valued courses both for professional and personal reasons**. While the vast majority of all learners stated that their reasons for taking part included 'to build on skills and knowledge' (90%), 65% also said that 'personal satisfaction' would be a key motivating factor to take part in more learning in the future. Wales Co-operative Centre training (i.e. general training) tended to be chosen because of its value to people in their professional lives, while over 70% of participants in WEA (foundation) training thought that 'personal benefit' was a key reason to take part.
- 3.1.5. The evaluation also suggested that **training delivered through the project is effective in achieving knowledge transfer**. Of the 79% of the sample who were affiliated to an organisation as an employee or volunteer, 87% said that they had been able to apply the learning and skills they had gained through the training course/s back at their organisation. This is a very positive finding and suggests that WCC's provision is well designed to meet the needs of those working or volunteering within the social economy. Further to this, 77% said that they had built on their learning once they had returned to the workplace, while 66% agreed that they had been able to 'informally train or transfer their learning to others in the workplace'.

3.1.6. The executive summary of WCC's evaluation report is attached to this document as an appendix.

3.1.7. Meanwhile, the DELLS contract manager's research found additional benefits for learners from attending courses, relating to work related outcomes as well as learning outcomes. For example, as one of the completed monitoring reports noted,

"Whilst the information, tools, knowledge acquired from the tutor was valued, learners greatly appreciated the opportunity to share their experiences solutions with each other. Networking was apparent, indeed even with only three different organisations present, leaflets on each other's organisations and initiatives were being readily shared."

3.1.8. WCC found a similar theme emerging from learner feedback forms. An analysis of open responses to the question 'what was the most satisfactory aspect of the course' was summed up as "meeting people from other co-ops and sharing experiences".

3.1.9. WCC's training is not only useful to individual learners. Si's research found that, from an organisational perspective, being able to offer accredited training helped to 'sell' social enterprises both to volunteers and to regulators, such as the Financial Services Authority. As one credit union employee explained:

"WCC's training is fantastic – from our perspective it entices volunteers into the organisation because you can advertise that they can get accredited training – this is a big incentive...They're tremendously supportive of the credit union movement. For external agencies, like the FSA, it's nice to for them to see that staff and volunteers are gaining accredited qualification."

3.1.10. Learners clearly perceived, therefore, that they had achieved real outcomes through taking part in WCC training. However, one drawback to the Centre's provision has been a lack of formal accreditation for courses using its revised curriculum to date. This is important for the sustainability of the project, as accreditation is necessary if the Centre is to access mainstream funding. The Contract Manager has encouraged the Centre to ensure its provision is accredited and WCC reports that 90% of its courses, including bespoke provision, will be OCN accredited in the near future.

Learning Network members

3.1.11. As WCC's own research comprehensively gathered training course participants' feedback, Si's evaluation activities focused more on the learning networks.

3.1.12. Evaluation research at a meeting of the South Wales Credit Unions employees' network showed that members found the meetings valuable and gained both 'soft' and 'hard' benefits from the network. The meeting clearly helped members to learn from one another informally, as well as actively encouraging them to take up formal learning opportunities.

- 3.1.13. Network members benefited from meeting with others in the same position. Owing to the small size of most credit unions, employees could feel isolated. Further, with credit unions having recently gone through major structural changes, being able to share experience and good practice with others in the same position was felt to be invaluable.
- 3.1.14. Participants' learning at the network meetings tended to be hands-on and closely related to their jobs. For example, one participant at a Credit Unions meeting was new to credit unions. She felt that the meeting was very useful, particularly to hear the update from NACUW, which set out the national and political context effectively.
- 3.1.15. The meetings also helped participants to identify, and begin to fill, skills gaps within their organisations. During one event, several participants raised concerns that treasury skills were hard to come by – one had just lost their treasurer, while another was about to lose theirs. The group discovered that one member was very adept at using the software through which Credit Unions' accounts were run (Keysure) and it was agreed that WCC would work with this participant to develop some training for other CU staff. Delegates agreed that there should be several people within their CU who knew how to use Keysure, so that there would be less disruption if treasurers left.
- 3.1.16. Participants were clear that the information they learned at the meetings would be of benefit to their organisations, as well as to themselves. For example,

"There was an issue clarified around state aid funding from the Scottish Executive and how this would impact and the WAG would follow suit. This was a huge benefit because this was a very cloudy area before but would have a lot of impact on paid employees."

3.2. Outcomes for Wales Co-operative Centre

- 3.2.1. Although its key beneficiaries were the learners themselves, the project also created some benefit for Wales Co-operative Centre as an organisation. The project manager felt that the project had helped to raise the profile both of Wales Co-operative Centre and of the social economy more generally. This was the case even for organisations within the social economy; it was one of the Centre's aims to encourage links to be built between different types of social enterprise, some of which may not have previously identified themselves with the wider 'social economy'.
- 3.2.2. WCC has also broadened its client base through the project. Previously, the centre reached clients who were mostly involved in co-operative businesses or credit unions, but now the client base is broader and includes other enterprises with a 'social' element such as non-profit making companies, food co-operatives, and business successions. The project has also enabled WCC to pilot new provision and to improve its previous course provision.
- 3.2.3. Overall, however, the project's impact on WCC was not transformational as the project allowed WCC to continue and improve on existing work rather than changing its focus.

4. CONTRIBUTION TO LCF OBJECTIVES

4.1. Aims of the Learning Challenge Fund

4.1.1. This section looks at the extent to which the Training for the Social Economy project contributed to the aims and objectives of the Learning Challenge Fund. In summary, the key objectives and success criteria for the LCF are as follows:

- innovation and new approaches in learning provision;
- a strategic approach at national, regional and local levels;
- collaboration between learning providers leading to improved learning networks;
- improving access and widening participation;
- delivering more and high-quality learning outcomes from existing resources; and
- effective mainstreaming of successful projects.

Innovation

4.1.2. Innovation was an important factor in the Training for the Social Economy project, as it aimed to improve WCC's existing provision, for example by delivering courses in new ways, to mixed groups from different organisations. The e-learning provision (while taking longer than planned to develop) is also a new innovation with no distance learning course for the social economy currently available, apart from at higher level.

4.1.3. The project can also be described as innovative in the fact that course content has moved and changed with needs. An example of this would be the provision of training needs analysis at different levels, responding to feedback that the full-day TNA was too intensive for some organisations.

4.1.4. The project manager, like some other LCF project managers, felt however that there was some restriction on the ability to innovate during the project, owing to the restrictiveness of the ELWa contract. Although it was possible to make some changes to the contract, this was a protracted process and would not enable projects to significantly shift their focus, instead tying contractors to delivery of set outputs.

Strategic approaches and collaboration between learning providers

4.1.5. Operating at a national level and as the main deliverer of training for the social economy, WCC had less of a need than some other LCF project deliverers to 'join up' provision in strategic way, and this was not a core focus of the project. Nevertheless, the project allowed WCC to rationalise its course material and timetable, as well as to carry out learner evaluation and improve its offer. Therefore, the project enabled the Centre itself to be more strategic in the way it planned provision for the sector across Wales.

4.1.6. Similarly, collaboration between learning providers was not central to the Training for the Social Economy project in the way that it was to several other LCF projects.

The Wales Co-operative Centre occupies a niche position as the main provider of training tailored to the needs of the social economy, operating across Wales. As such, it does not have the same need to collaborate with other providers to rationalise provision. Nevertheless, the project did revolve around important partnerships, such as with the WEA, who delivered courses on WCC's behalf.

Improving access and widening participation

- 4.1.7. Widening participation was a main objective of the project, which set challenging targets for new beneficiaries. Through the project, WCC offered general training aimed at different levels, from courses on more advanced specialist skills for the social economy (e.g. managing financial accounts, business planning) through to personal development (e.g. money matters). WEA, meanwhile, delivered courses that were more leisure-oriented and aimed at personal development. The Training for the Social Economy project therefore widened participation by offering training suited to a range of abilities and personal circumstances.
- 4.1.8. In addition, WCC has been proactive in encouraging learners and organisations to take up learning opportunities – for example, by offering Training Needs Analyses. Conducting Training Needs Analyses has helped to identify a prior gap in provision. WCC has found that some social enterprises have specific training needs, which could only be met through bespoke courses, but do not have enough staff or volunteers to make a bespoke course viable (WCC courses need at least 8 learners to be able to run). The training officers have therefore been looking at how they can set up joint bespoke courses for social enterprises with similar training needs – this offer is marketed as 'Learning Co-operatively'. This is one example of how the project has provided learning opportunities that would not otherwise have been available - and has therefore widened participation and increased access to learning.

Delivering more and high-quality learning outcomes

- 4.1.9. WCC aims both to reach more learners (through expanding its offer to the whole of the social economy rather than focusing only on credit unions and co-operatives) and to deliver higher quality learning outcomes through its new approach to course delivery. While quality of learning outcomes is difficult to measure, learner feedback, as outlined in the two previous sections of the report, clearly indicates that learners felt that the courses they attended were of high quality.

4.2. Sustainability and mainstreaming

- 4.2.1. Some aspects of the Training for the Social Economy project have already been mainstreamed into the Wales Co-operative Centre's work. An example of this is the Training Needs Analyses, which are becoming part of WCC's general approach, as development officers have now been trained to deliver these. Further, WCC can continue to make use of its revamped curriculum (including the e-learning course when this is complete) after LCF funding finishes.
- 4.2.2. At the time of writing, the Centre had not yet secured additional funding for ongoing delivery of training courses. LCF is not WCC's only source of funding but provides a significant proportion of its training budget at present. As noted in section 2 of this report, the Training for the Social Economy project has now been extended to December 2006. This is to enable the project to complete its targets

for beneficiary hours; the Centre is not receiving additional funding but simply extending the duration of the project. This extension is viewed as important to the Centre as it allows them to maintain the project's momentum – the project has in recent months recruited large numbers of new beneficiaries and it is positive that the provision is not now being abruptly stopped.

- 4.2.3. Following expiration of LCF funding, it is not currently clear how the majority of future provision will be paid for. The Centre is looking at applying for other funding streams to maintain a similar level of course provision, although this may have to be reduced or targeted in a different way to meet funding requirements. WCC is not in a position to receive mainstream DELLS funding, but it also exploring the possibility of sub-contracting to an organisation that can access this funding, for example the Workers' Educational Association (effectively reversing the current sub-contracting arrangement).
- 4.2.4. From the point of view of the Learning Networks, it is WCC's intention that these become self-sustaining - continuing to meet without needing WCC support. Since WCC helped to build its capacity, the North Wales Credit Unions Network has now begun to facilitate its own networking meetings, building network sessions into an existing regular meeting. The Centre aims to help other networks to follow suit.

5. CONCLUSIONS AND LEARNING POINTS

5.1. Conclusions

- 5.1.1. To date, the Training for the Social Economy project appears to have progressed well, broadly meeting its targets for beneficiary numbers. WCC's provision has been received enthusiastically by learners and the organisations that they work or volunteer for, while the concept of Learning Networks has been taken up by organisations within the social economy.
- 5.1.2. The evaluation research carried out by the Centre, DELLS and Si has demonstrated that WCC understands its learners' needs and has responded to them effectively. Learner feedback on the quality of provision, garnered from a range of sources, has consistently been extremely positive. Through the project, WCC has also piloted several new forms of provision that have filled gaps and made learning more accessible to a wider group of people.
- 5.1.3. The report demonstrates that learners themselves feel they benefit from WCC's training provision, both in their personal and professional lives. There is evidence of knowledge transfer, not only among learners who have taken part in general or bespoke training courses, but also among Learning Network members. The mini-evaluation suggests that the Centre's proposition that learning would be improved if training were delivered to mixed groups from different organisations, rather than within single organisations, has been shown to be valid.
- 5.1.4. The mini-evaluation also shows that the project fitted well with several of the LCF's objectives, particularly around innovation, raising quality of learning, and widening participation.
- 5.1.5. The Wales Co-operative Centre has strengthened and improved its training offer through the Training for the Social Economy project, and the revised curriculum and course structure can be sustained into the future. The links between social enterprises, established via the Learning Networks, can also be taken forward as the Networks become self-sustaining. Nevertheless, the Centre still hopes to source further funding for delivery of general and bespoke training, as LCF provided a major source of funding for the Centre's training programme. At the time of writing, this had not yet been secured.

5.2. Learning for DELLS

- 5.2.1. As with several of the other LCF projects, the Wales Co-operative Centre found the rigidity of the LCF contract a problem, although this is not to say there was no flexibility – in fact the contract went through three variations (and DELLS is considering a fourth contract variation to allow further time to deliver outputs). Nevertheless, in our main report on the LCF programme, we have suggested that, since many LCF projects were pilots, with potential outcomes uncertain, more flexibility around contracted milestones and outputs would have been useful. For longer term projects like Training for the Social Economy, one way around this might have been to build in a review stage to the original contract, for example after the first year of delivery, where outputs and outcomes to date were reviewed to see if future targets remained valid. For pilot or developmental projects, it is important that deliverers can adapt to changing circumstances and learn from processes as they go along – and tying project managers to set outputs and milestones from the beginning may stifle innovation.

APPENDIX: SUMMARY OF WALES CO-OPERATIVE CENTRE'S OWN EVALUATION SURVEY

The Wales Co-operative Centre is contracted with the Welsh Assembly Government through the Department of Education and Lifelong Learning and Skills and the Welsh European Funding Office to deliver the 'Learning through the Social Economy' project throughout Wales. The participants in this project are involved in the Social Economy in Wales. The project strives to provide learning opportunities for these individuals to further this involvement and strengthen the social economy in Wales. A key method of working is bringing participants together to learn, so maximising the opportunity for inter-learning and working.

Training Delivery

Training delivery under this project falls broadly into 3 categories.

- **Specialist training** – training for co-operative businesses and credit unions on regulation and disciplines specific to running these types of business.
- General training – training for co-operatives, credit unions or other members of the social economy on subject areas of common need.
- **Foundation courses** – training for members of the community who are either members of a co-operative or are individuals taking part in the social economy (delivered by South Wales Workers Educational Association, Coleg Harlech WEA and external tutors)

The method of delivery is student centred, interactive and promotes accessibility and an interactive learning environment.

These learning opportunities are made available through training sessions, workshops, both diarised and bespoke.

Scope and Purpose of this Report

This report will provide information on the aims, evaluation methods, results and analysis of a survey undertaken with random samples of participants who have benefited from this project between October 2003 and January 2006.

Aims

An evaluation of the quality of training was undertaken at the beginning of 2005. Commitment to maintaining the quality and relevance of training has led us to carry out a further survey to obtain up to date information from participants who have received training throughout this project.

In particular we wanted to examine the areas of:

1. Participation in Learning
2. Quality of service
3. Skills in the workplace

Evaluation Methods

Evaluation through surveying a sample of participants was commissioned to Audiences Wales who undertook this research on behalf of the Wales Co-operative Centre.

A range of questions was designed to look at the 3 areas of interest. Rather than a written survey a telephone survey was with 150 participants in the project. At the time of the survey this sample represented 8% of the total participants in this project.

The participants were split into lists based on training provider. Random samples taken from the with the following breakdown:

Those attending Wales Co-operative Centre training	79%	- total 120
Those attending Coleg Harlech WEA training	6%	- total 9
Those attending South Wales WEA training	15%	- total 22

In this way survey results would correctly reflect the profile of beneficiaries of the project overall.

Two slightly differing lists of questions were used, one for Wales Co-operative Centre training participants and the other for both WEA sets of participants.

Results

The results of this survey indicate that the perception of training received and the service methods used are very positive and useful to the participants.

Questions were designed to look at participation, quality of service and skills in the workplace. Careful thought was given to setting objective questions with unbiased options for answers and invitation to expand where appropriate.

Participation

Participants were questioned regarding their motivation for going on the course. The most common reason for booking on a course was to 'build on skills and knowledge' which was cited by 90% of the total sample.

To 'improve performance at volunteering or work' and to 'update and maintain professional knowledge' were both given by over 70% of the Wales Co-operative Centre participants. Over 70% of WEA participants from WEA offer 'personal benefit' as one of their reasons, in comparison to only 33% of the Wales Co-operative Centre participants.

Other reasons for booking on training included 'to help the organisation they were working for', 'general interest' or that they were 'required to go by their employer'.

In order to gauge the level of motivation for training the following was explored further.

The importance of access to training programmes was very clear. Across all three groups of participants 97% felt that training programmes were either 'important' or 'somewhat important', with only 2% stating that it was not important. 68% of WEA participants went on to state that thanks to the course they had increased their involvement with a community activity or business. It may be that this response is weighted in favour of those who value learning, because by definition these individuals have attended training in the recent past. However, it is important to note that the overwhelming response post attendance is positive. It also supports the widely held belief that engaging people in learning is a useful way to progress their inclusion in a range of other activities.

Participant comment:

'Excellent courses – have booked onto another two courses for next month already. The two trainers were really good.'

When participants were asked what could motivate them to undertake additional future training, the most common answer across the whole sample was 'keeping my profession knowledge up to date', cited by 76%. This was followed by 'personal satisfaction' (65%) and development into a new role or job' (37%). It is interesting that the value of learning is acknowledged on both a personal and professional basis. This may be because the training was both enjoyable to the individual as well as of value professionally. It is well documented by academics that an individual will retain information and skill that they have acquired by interactive and enjoyable learning.

Participants in Wales Co-operative Centre training were asked whether various factors might prevent them from undertaking future training. The highest level of agreement was with 'training costs too much', an obstacle recognised by 48% of participants. 'I can't find appropriate courses' (29%) and 'I can't get time off work – too much to do' (25%) were also both cited.

Only 2% felt that their 'manager did not support their training needs' whilst just 6% stated that their 'organisations do not allow time for training'. This is encouraging as it shows that employers committing themselves to the value of training. The Skills and Employment Action Plan refers to the need to stimulate demand for training – that provision of training opportunities are not enough. More organisations appear to be taking on the values of Investing in People. The provision made through this project supports organisations in the social economy to make the most of their commitment, although there are still challenges.

In consistency with the above finding that 25% of respondents find it difficult to find time to attend training, 54% indicated a preference for short courses (1-2 days). Fitting learning into the operational challenges of running a business more realistically can be difficult, but provision of short units means that learning is more accessible. Other methods of training delivery can help with this. For example a blended learning system whereby e-learning is used as a precursor to face to face courses can maximise learning whilst minimising time away from the business. This, of course, would be appropriate only for some courses and a section of participants.

25% preferred 'practical hands-on learning in the workplace'. However whilst The Welsh Assembly accepts the value of this method of delivery, increasing the

quality of work-based learning is a challenge identified in the Learning Country 2.

When questioned about further training, 52% of WEA participants had undertaken further training, 42% with another provider and 10% with the Wales Co-operative Centre as follow on training.

Participant comment:

'Have completed 2 courses and signed up for more. Really enjoyed them, very high standard.'

Quality of Service

All participants surveyed were given various value statements about their courses and asked whether or not they agreed with them. There was an extremely positive response with over 90% of people agreeing with each of the statements.

The highest level of agreement, 98% was with the statements 'the instructor had a good rapport with the group' and 'the instructor explained the course material clearly'. These responses along with positive responses on all of the other value statements (all equivalent or in excess of 94%) show that those surveyed had experienced well-delivered appropriate training for their needs. The methods and style of trainers were clearly well received. This is particularly important in a project such as this where student centred learning techniques are used enhance the quality of the material.

Participant comment:

'Enjoyed the course. Good to meet other people on the course who were running credit unions. Trainer was good. Came away feeling that we'd done something worthwhile and that we hadn't wasted a day. Good relaxed atmosphere.'

In gauging the value of the training opportunities, participants were asked whether they would recommend the training to others. The table below shows a natural corollary to the findings on quality of service.

70% of respondents would recommend the training because 'it was useful to their organisation' and 20% because 'it was good discussing the issues with others on the course. One participant responded that they would not recommend the course because they 'didn't like the venue or conditions' and another because 'it was not what I was looking for or expecting'. The latter case highlights the importance of clear guidance on content prior to attending the course. This is always provided, but it is a challenge to make sure that all potential participants take this on board, particularly the level of learning to be undertaken. This was reflected in the comment 'although the course was good, I found it a little basic for the needs of my organisation'.

Participant comment:

'Course was very professionally run. Felt able to participate full and ask questions as the atmosphere was very relaxed.'

*Felt I learnt from instructors and other members of the group.
Also good aftercare.'*

Skills in the workplace

Many of the participants in this project have attended very short courses of 1 or 2 days. These courses are designed to transfer as much knowledge and skill as possible in a short a training period in order to make the training accessible. Courses are designed to equip participants with the knowledge and tools to build on the course content back in their organisation by using and practising their learning.

In addition to training participants continuing their learning in the organisation, others who work alongside them can benefit. These areas along with organisational learning issues were explored with the participants using the survey questions.

In order to research the motivations and attitudes towards training on an organisations level, participants were separated out according to whether or not they were affiliated to an organisation as an employee/volunteer. Those that were, 79% of the total number of people who were surveyed, were asked further questions.

87% of employees / volunteers said that they have been able to apply the learning and skills gained back at their organisation. Further comments were invited and the following are examples of responses:

- skills learnt were useful / relevant and increased knowledge and awareness
- enabled them to do their job more efficiently / be more professional
- helped them be more confident
- they have produced specific work based on the skills learnt

In exploring further learning, 77% of this group said that they had built on their learning once they had returned to the workplace. This is extremely encouraging as the project aims to provide learning opportunities that individuals can build on through further formal, informal or work based learning. This response shows that this aim is being met where further work based learning is appropriate.

Even more encouraging is the response that 66% of respondents said that they had been able to 'informally train or transfer their learning to others in the workplace' on their return. Most individuals used discussion to facilitate this transfer rather than formal feeding back. Whilst it is clearly an advantage for all individuals in an organisation to attend all appropriate training, it is not practical for many. In the absence of this ideal, some transfer of knowledge and cascading of learning is both empowering for the individual and the best use of personnel hours for a small organisation.

Participant comment:

Course very helpful, One month after completing it, I felt confident enough in my own skills to conduct a staff training exercise. Also very affordable – excellent.

Further comments from participants

In addition to the measurable responses to questions posed, it is interesting to look at further comments made, some of which have been quoted in the body of this report.

The overwhelming response has been positive with comments on the value of the learning to the individual / organisation, quality and style. The few negative comments that have been around arrangements such as venue, distance to travel, affordability (ie reimbursement of travel therefore initial outlay by participant) and access to information about courses being run. Where participants have given enough information for us to investigate further, we have done so.

Conclusion

This evaluation was undertaken to obtain feedback from individuals who had participated in the project at any time since its inception. This has produced useful information in a range of areas feeding back into the operation of training delivery. It has also provided a longitudinal aspect to feedback, with the participants having had time to reflect and build on and implement their learning.

Although the sample size was small (8% of participants) the study has given an indication of the quality and value of training to individuals and organisations in the social economy that have been supported.

Participant comment:

I have been on many training courses over the years with other companies – expensive and 'pants'! I was delighted by the high standard of training offered by WCC – very high quality.